

Personal Income Tax Checklist

Please use this handy reference of common items that you may need to include when providing us with your tax documentation.

Changes:

- Change of address or contact info – please note any change of address, phone numbers or email address
- Have you sold a home in the past year? – please advise us of this as we will need additional information regarding the sale of the home
- Family situation – please note any changes such as marital status (include date of change) or additional children (name & date of birth).
- If you would like to set up direct deposit (or change the bank account of an existing one) for your refund or tax benefits, please attach a void cheque or pre-authorized debit form.

Income:

- All T4 slips
- Investment income slips – such as T5, T3, T4RSP, T4RIF, T4PS, T5008
- Pensions – Old Age Security T4A(OAS), Canada Pension T4AP, other pensions and annuities T4A.
- Employment insurance benefits – T4E
- Social assistance / Workers Compensation Payments T5007
- Other income - T4A includes RESP income, scholarships, lump-sum, self-employed commission, fees for services, and much more

Expenses:

- Childcare or camp – with supporting receipts
- Adoption costs
- Tuition receipts – T2202
- Interest on student loans
- Child or spousal support – please provide copy of agreement if not already on file

- RRSP contributions
- Rent / property Tax
- Professional fees or union dues (if not included on T4)
- Medical expenses – please obtain annual statements where possible, such as from your pharmacy (for prescriptions), chiropractor, etc.
- Charitable or political donations (not included on T4)
- Tool expenses for tradesperson
- Moving expenses – only if moving for work
- Carrying charges and interest expenses (interest on investment loan)
- If you have employment expenses, include the T2200 filled out by your employer
- Disability Tax Credit Certificate (T2201)

Other:

- If you are self-employed, please fill in our Statement of Self-Employment, found on our website <https://bordenbeancounters.com/client-forms>. Note that there are 2 versions – one for those registered for HST, and one for those who are NOT registered
- If you claim employment expenses, along with your T2200, please fill in our Statement of Employment Expenses, found on our website <https://bordenbeancounters.com/client-forms>